



Comptroller of Public Accounts

State of Texas Cooperative Purchasing Manual

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I. Introduction

Created by legislation in 1979, the Texas Procurement and Support Services Cooperative Purchasing Program (State of Texas CO-OP) provides the State of Texas volume purchasing power to local governments and assistance organizations. Members can purchase goods and services from state term contracts, TXMAS contracts, and travel contracts. Using these services through the State of Texas CO-OP will meet your competitive bidding requirements.

In this manual you will find general information about the State of Texas Cooperative Purchasing Program, as well as instructions for using state contracts. Should you have any questions regarding the CO-OP program or the use of state contracts, please feel free to contact the CO-OP team.

Phone: 512-463-3368

Fax: 512-936-2667

E-mail: coop@cpa.state.tx.us

**Mail:
State of Texas CO-OP
P.O. Box 13186
Austin, TX 78711**

II. Membership Basics

Membership Code and Status

View your five-character CO-OP membership code (or agency number), primary contact information, and renewal date via the online membership list at

www.window.state.tx.us/procurement/prog/coop/coopmemb/

You will receive membership renewal notices at 30 days prior and two weeks prior to your membership renewal date.

Updating Contact Information and Authorized Purchasers

- For Agent of Record name changes, the State of Texas CO-OP requests that you complete a Name Change form. Since Agents of Record are authorized to sign purchase orders, their signatures must be on file. You can download a Name Change form at www.window.state.tx.us/procurement/prog/coop/coopform/
- To change your entity's e-mail address, physical address, or phone numbers, please e-mail or fax the changes to the CO-OP team.
E-mail: coop@cpa.state.tx.us
Fax: 512-936-2667

Additional Support

Contact the CO-OP team for information on the following topics:

- Certified Purchasing Training Program classes open to CO-OP members
—see www.window.state.tx.us/procurement/prog/training-cert/
- Request a speaker for your next event
- Vendor Performance System
- Vendor Relations Support

III. Purchasing Options

Purchasing Statutes

The State of Texas CO-OP offers several purchasing options to members. Specific statutes governing CO-OP purchases from State contracts include:

1. Local Government Code, Section 271.083(4)(b) states:
A local government that purchases an item under a state contract satisfies any state law requiring local governments to seek competitive bids for the purchase of the item.
2. Government Code, 2155.062. PURCHASE METHODS
 - a) In purchasing goods and services the commission may use, but is not limited to, the:
 - 1) contract purchase procedure;
 - 2) multiple award contract procedure, including under any schedules developed under Subchapter I;
 - 3) open market purchase procedure; or
 - 4) reverse auction procedure.
 - b) Chapter 2156 provides additional information on purchase methods.
 - c) Chapter 2157 provides additional information on purchase of automated information systems.
 - d) In this section, "reverse auction procedure" means:
 - 1) a real-time bidding process usually lasting less than one hour and taking place at a previously scheduled time and Internet location, in which multiple suppliers, anonymous to each other, submit bids to provide the designated goods or services; or
 - 2) a bidding process usually lasting less than two weeks and taking place during a previously scheduled period and at a previously scheduled Internet location, in which multiple suppliers, anonymous to each other, submit bids to provide the designated goods or services.

Contracts

The State of Texas CO-OP recommends reviewing our contracts for your purchasing needs in the following order:

1. TxSmartBuy
2. Term Contracts
3. Food Schedules
4. TXMAS Contracts
5. Department of Information Resources (DIR) Contracts

Resources

If you have not identified the item or service you seek on an existing contract, the State of Texas CO-OP provides the following services:

1. Search for other vendors on the Centralized Master's Bidders List to solicit bids (this is NOT an approved vendor list).
2. Request Comptroller of Public Accounts (CPA) support for an Open Market Purchase. If we have the expertise and the resources required, we will assist you with your purchase.
3. Coordinate with our Reverse Auction service vendor (on contract) to competitively bid your item or service.
4. Use the Electronic State Business Daily to post bid solicitations and awards on-line.

IV. TxSmartBuy

Overview

The Texas Procurement and Support Services (TPASS) Division has developed a new on-line shopping cart purchasing system, coined TxSmartBuy. This new system allows users to search, compare and purchase state contract items without submitting any paperwork. Users have the ability to quickly and easily place and change orders on-line. When you place your order online a state PO is generated automatically and a copy is e-mailed to you and to the vendor.

How to Order

Please visit www.txsmartbuy.com to learn more about the system.

To get set up with a username and password, please visit the following link:

http://www.window.state.tx.us/txsmartbuy/agy_coop_info.html

For instructions on how to place an order, please see the purchaser guide:

<http://www.window.state.tx.us/txsmartbuy/help/PurchaserGuide.pdf>

For other helpful resources, including system demos and the help desk phone number, please visit the TxSmartBuy Help Page:

<http://www.window.state.tx.us/txsmartbuy/help/>

NOTE: Most, but not all state contracts are available on the TxSmartBuy system. To purchase items not on the TxSmartBuy system, you may use any of the following types of state contracts. Click on any of the following contract types to see instructions for using these contracts.

Term Contracts: http://www.window.state.tx.us/procurement/cat_page/

TXMAS Contracts: <http://www.window.state.tx.us/procurement/prog/txmas/>

Travel Contracts: <http://www.window.state.tx.us/procurement/prog/stmp/>

DIR Contracts: <http://www2.dir.state.tx.us/ict/contracts/Pages/ProductsServices.aspx>

V. Term Contracts

http://www.window.state.tx.us/procurement/cat_page/

- CPA term contracts are competitively bid and established by the State's purchasing team, using quantity purchasing history and the State's volume purchasing power to establish best value.
- CO-OP members can order items from more than 200 contracts at any quantity and dollar amount. Contracted commodities and services include copiers, vehicles, law enforcement supplies, medical equipment, the State of Texas Payment Card Program, shipping services, and more.
- Term contracts are posted online by National Institute of Governmental Purchasing (NIGP) class number, are searchable by keyword, and are refreshed online weekly or as needed by CPA.
- Contract types:
 - **Automated Contracts** – e.g.: 045-A1 Appliances and Equipment, Household Type
 - Include specific commodity codes and clauses
 - If the contract is on TxSmartBuy, orders must be placed using the TxSmartBuy system. If the contract is not on TxSmartBuy orders are placed by submitting your internal PO to the vendor.
 - **Non-Automated Contracts** – e.g.: 055-N1 Automobile and Truck Accessories
 - Include additional requirements that cannot be described by a specific commodity code (i.e., voting machines, business cards)
 - If the contract is on TxSmartBuy, orders must be placed using the TxSmartBuy system. If the contract is not on TxSmartBuy orders are placed by submitting your internal PO to the vendor.
 - **Managed Contracts** – e.g.: 071-M1 School Buses
 - Issue your own internal purchase order directly to the vendor. PO must reference contract number to be eligible for contract pricing.

Please check the term contract for additional ordering instructions.

How to Search

You can access the CPA Term Contracts at:

http://www.window.state.tx.us/procurement/contracts/all_term/

On this web page, there is a complete listing of all of the current CPA term contracts in order of the numeric commodity class code. To access each contract, click on the "Details" link.

The keyword search box is in the top right-hand corner of the contract listing page.

VI. Texas Multiple Award Schedules (TXMAS)

<http://www.window.state.tx.us/procurement/prog/txmas/>

Texas Multiple Award Schedules offer such items as tires, sporting equipment, furnishings for offices and facilities, general contractor services and much more.

TXMAS Contracts meet your competitive bidding requirements.

Texas Government Code 2155.504. USE OF SCHEDULE BY GOVERNMENTAL ENTITIES

- (a) A state agency or local government may purchase goods or services directly from a vendor under a contract listed on a schedule developed under this subchapter. A purchase authorized by this section satisfies any requirement of state law relating to competitive bids or proposals and satisfies any applicable requirements of Chapter 2157.
- (b) The price listed for a good or service under a multiple award contract is a maximum price. An agency or local government may negotiate a lower price for goods or services under a contract listed on a schedule developed under this subchapter.
- These contracts were developed from contracts that have been competitively awarded by the federal government or any other governmental entity of any state and offer access to multiple vendors with preferred State of Texas customer pricing. The schedules cover multiple commodity groups with multiple year duration (basic five years with three extension options).

How to Recommend a Vendor for a TXMAS Contract

- To request a product or service addition to the TXMAS program or to suggest a vendor addition who is on a GSA (federal) contract or another state contract that you would like to see on a TXMAS schedule, please send an email to txmas@cpa.state.tx.us or call 512-463-3421.

How to Search

1. You can access the TXMAS Contracts at <http://portal.cpa.state.tx.us/txmas/>
2. TXMAS Contracts are listed by schedule with a description. To access each contract, click on the contract number.
3. The General Contract Information, including Terms and Conditions, is listed first with links to the vendors' online TXMAS product list and pricing.
4. Click 'Online Catalog/Order Processing' to view a vendor's price list. Vendors may ask you to log in to access their TXMAS pricing.
5. You can also do a keyword search from <http://www.window.state.tx.us/procurement/prog/txmas/>

How to Order from a TXMAS Contract

- TXMAS contracts have contractors and most also have dealers. If the contract has dealers, then you can send your internal PO directly to the dealer.
- If the contract is available on TxSmartBuy and does not have dealers (meaning only the contractor processes sales) then you must place your order using the TxSmartBuy system.

VII. Food Schedules

For certain commodities, CPA combines requisitions into one solicitation for items that are used by many entities within a specified period of time. These purchases are called Scheduled Purchases, a form of term contract. CPA sends Scheduled Purchase requisitions to CO-OP members who request a copy. Entities complete the requisition based on anticipated needs and return it to CPA on or before the specified schedule deadline date.

How to Order -

CPA negotiates a variety of scheduled food purchases each year for agencies, school districts, and other CO-OP members. Food and delivery schedule input per agency or CO-OP member is requested by CPA at the beginning of the calendar year. Food types offered include:

- Full Line Food for Cafeterias by regions;
- Bread and pastries; and
- Milk and dairy.

To be placed on the mailing list to receive a Schedule Requisition, please contact the CO-OP team.

VIII. DIR Store – IT Products and Services

The Department of Information Resources (DIR) offers state-negotiated contracts with discounts from major information technology vendors. CO-OP members may order IT items from DIR contracts.

Contracts include:

- Computers
- Software
- Networking Equipment
- Data Storage/Storage Area Network Equipment
- Printers
- Videoconferencing & Communications Equipment
- IT Equipment
- Training

How to Search

You can access DIR Contracts from the CO-OP web page or go directly to <http://www2.dir.state.tx.us/ict/contracts/Pages/ProductsServices.aspx>.

On the DIR search page, you can search by product type, keyword, contract number or commodity class code.

IX. Centralized Master Bidders List

<http://www.window.state.tx.us/procurement/cmb/cmbhub.html>

The Centralized Master Bidders List (CMBL) is a master database used by state agencies to develop a mailing list for vendors to receive bids based on the products or services they can provide. Vendors wishing to furnish goods or services to the state should get registered on the CMBL to receive notice of bid opportunities.

THE CMBL IS NOT AN APPROVED VENDOR LIST

The CMBL is simply a searchable mailing list. A vendor on the CMBL has paid \$70 a year to be listed on the CPA website and receive solicitation notifications. A vendor is not required to be on the CMBL to do business with the State of Texas. Vendors on the CMBL may or may not have contracts with the State of Texas.

You may use the CMBL to search for sources. CPA recommends following your internal purchasing policies. Typically, informal bids are required for purchases between \$5,000 and \$25,000. The CMBL can be used as a source of vendors for specific commodity types that your organization plans to bid competitively.


How to Search the CMBL:

Enter one or any combination of the following search terms:

- Vendor ID or Vendor Number
- Vendor Name
- Vendor located in a specific City
- Specific Class and Item Codes (search by the goods or services the vendor can provide)

Historically Underutilized Business Search

You can also search the CMBL for Historically Underutilized Businesses (HUBs). A "Historically Underutilized Business" is an entity with its principal place of business in Texas, and is at least 51% owned by an Asian Pacific American, Black American, Hispanic American, Native American and/or American woman who reside in Texas and have a proportionate interest and demonstrate active participation in the control, operations and management of the entity's affairs.

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Centralized Master Bidders List (CMBL) & Historically Underutilized Business (HUB) Search

Search:
☒ CMBL only, ☐ HUBs on CMBL, ☐ HUBs not on CMBL
☐ HUB Mentor Protege, ☐ All Vendors

Vendor ID: ?
Vendor Number: ?
Vendor Name: begins with Name ?
Include Inactive Vendors: ☐ ? Small Businesses Only: ☐ Yes, ☒ No

Selection 1: Class Code: Item: District:
Selection 2: Class Code: Item: District:
Selection 3: Class Code: Item: District: ?
[Class Code](#) | [Item Code](#) | [District](#)

Texas County:
City: begins with
Zip: begins with
Sort by: Vendor Name
Output as: Detail List
Results: return all matches

? Click this Help icon for information and tips on generating search lists and files

Related Links
[CMBL Registration](#)
[HUB Directory](#)
[HUB Mentor Protege Agreement Listing](#)
[Excluded Parties List System Search](#)
[Debarred Vendors List](#)

Output may contain coded information in [Hub Status](#) and [Reason Off CMBL](#)

X. Competitive Bid Support

CPA Process

For large purchasing requisitions, members may request CPA's assistance to competitively bid needed items. Requests are considered on a case-by-case basis. Your organization will be asked to complete a requisition form for Open Market Bids to which you can attach your specifications. You may request to see the bids during the process; however, CPA purchasers will finalize the decision based on criteria determined with your purchasing team prior to posting the bid.

XI. Reverse Auctions

CPA offers Reverse Auction services at no cost to members for large commodity purchases. This online service encourages suppliers to compete on price, achieving such savings as 25-30% over previous sealed bid rates for the same purchase type.

- <http://www.window.state.tx.us/procurement/contracts/gci/961-M1.php>
- Statutory Authority signed into law in 2001: Texas Government Code: Section 2155.062 (a)(4)
- Term Contract 961-M1 with Orbis Online
- Buyers post requirements and challenge multiple suppliers to offer bids.
- Suppliers can see whether they have been underbid and get the opportunity to respond with multiple counter offers.
- The best deal can be the lowest price OR best value—other factors usually enter into the decision, as well.

When to use

- Orbis will help you determine if your bid is suitable for reverse auction and will provide training
- Key determination criteria: competitive market, lot size, competitive specifications, sources of supply, your organization's requirements
- Orbis' fee is built into vendor pricing; no exchange of funds between you and Orbis

How to use

- Reverse auctioning is preceded by an IFB, defining the desired specifications
- Results of an event are then delivered to the buyer to make an award determination
- Sample Commodities and Services:
 - Construction/Maintenance Equipment
 - Office, Printing and Packaging Supplies
 - Food Products
 - Security and Safety Equipment
- Savings Examples:
 - TxDOT Emergency Generator – savings of 32% over previous bids
 - TxDOT Ground Boxes – savings of 24% over previous bids

XII. Travel Contracts

<http://www.window.state.tx.us/procurement/prog/stmp/>

The State Travel Management Program (STMP) of the State of Texas was created by the 70th Texas Legislature in 1987 (Texas Government Code 2171) to provide centralized management and coordination of state travel.

The STMP is designed to help state agencies and eligible CO-OP Members make more efficient use of taxpayer dollars by assisting them in managing state travel expenditures and by providing discounted travel services through vendor contracts and monitoring state travel activity.

Contracts include:

- Rental Car Contracts
 - Avis
 - Enterprise
- Hotels
 - Both In-State and Out-of-State
- Travel Agency Services
 - National Travel Systems
 - Short's Travel Management
- Airlines
 - JetBlue Airlines
 - American Airlines
- Travel Card Program
 - Citibank

Effective September 1, 2004, Texas municipalities, school districts, public community/junior colleges, counties, county officers and employees, including county sheriffs, deputy sheriffs, emergency communication districts, and juvenile probation officers, traveling on official business may use the STMP's state contracts for travel services, provided these entities are participating in the Cooperative Purchasing Program of the Comptroller of Public Accounts.

Eligible Entities:

- County
- Emergency Communication Districts
- Municipality
- Public Junior/Community College
- School District
- Hospital Districts
- Transit Authorities
- Workforce Development Boards (considered state agencies for travel)

XIII. Electronic State Business Daily

The Electronic State Business Daily (ESBD), the bid posting website for the State of Texas, was created by Texas Government Code 2155.074 in 1998. CO-OP members have access to the ESBD to post their solicitations with an expected value exceeding \$25,000. The ESBD is located at <http://esbd.cpa.state.tx.us>.

Solicitations and awards are searchable by entity type, requisition number, key word, and NIGP code.

The state agency posting requirements are as follows. Your entities requirements may differ, so please consult your purchasing procedures.

Estimated Procurement/Contract Amount **Advertisement**

Exceeding \$25,000:

If posting entire bid or proposal solicitation package

Minimum days for

14 calendar days

If not posting entire bid or proposal solicitation package

21 calendar days

Bid notices include the following information:

- a short title and a brief description of the goods or services to be procured and any applicable state product or service commodity codes for the goods and services;
- the last date and time on which bids, proposals, or other applicable expressions of interest will be accepted;
- the estimated quantity of goods or services to be procured;
- the estimated date on which the goods or services to be procured will be needed;
- the name, business mailing address, and business telephone number of the ordering entity point of contact to obtain all necessary information related to making a bid or proposal or other applicable expression of interest for the procurement contract;
- the agency's purchase requisition number, and
- any applicable documents, such as complete specifications, may be attached.

To gain access to the ESBD, please email esbdsupport@cpa.state.tx.us or your CO-OP team at coop@cpa.state.tx.us.



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Electronic State Business Daily (ESBD)

You are here: Home » Procurement » Tools » Electronic State Business Daily

Browse Postings

» View Newest postings

» Agency: Sort pulldown list by Name, Number | Lookup Agency Name
(All Agencies)
Search Type: Search Bid / Procurement Opportunities
Agency Requisition Number:
NIGP Class - Item Number: Class - Item (Item Number NOT Required)
Order Results By: Agency

Search Postings

» Search Open Bid / Procurement Opportunity's Title and Notes Sections ([help](#))

» In Depth Keyword Search of Open Procurement Opportunity's *

XIV. Glossary

- Advertise** – To make a public announcement of the intention to procure goods or services.
- Award** – The act of accepting a bid, proposal, or offer; thereby resulting in a contract between the state and a vendor.
- Best Value** – The lowest total price at the highest quality.
- Bid** – An offer to contract with an entity, submitted in response to an Invitation for Bid (IFB)
- Centralized Master Bidder's List (CMBL)** – A mailing list, maintained by CPA, of vendors who have expressed interest and registered to receive notice of bid or proposal opportunities based on the products or services they provide.
- Piggyback Contracts** – Competitively awarded contracts in accordance with State of Texas statutes, rules, policies, and procedures, and have been extended for the use of other state agencies and active CO-OP members.
- CPA** – Texas Comptroller of Public Accounts
- Electronic State Business Daily (ESBD)** – A marketplace of procurement opportunities greater than \$25,000 posted on the Internet. State agencies are required to post in the ESBD procurement contract opportunities that will exceed \$25,000 in value.
- Emergency Procurement** – A situation requiring a state agency to make a purchase more quickly in order to prevent hazard to life, health, safety, welfare, or property or to avoid undue additional cost to the state.
- Free on Board Destination** – The process in which a title for purchased goods transfers to the ordering entity as soon as the ordering entity receives and accepts the goods.
- Invitation for Bid (IFB)** – A solicitation requesting submittal of a bid in response to the required specifications.
- Life Cycle Cost** – The total cost associated with buying, owning, and using a physical product or service.
- National Institute of Governmental Purchasing (NIGP) Commodity/Service Codes** – Standardized national classification codes that identify goods and services.
- Negotiations** – A consensual bargaining process in which multiple parties attempt to reach an agreement on a disputed, or potentially disputed, matter.
- Professional Services** – Services directly related to professional practices as defined by the Professional Services Procurement Act, Texas Government Code § 2254.002.
- Proprietary** – Products or services manufactured or offered under exclusive rights of ownership; including rights under patent, copyright, or trade secret law. A product or service is proprietary if it has a distinctive feature or characteristic which is not shared or provided by competing or similar products or services.
- Proposal** – An offer submitted by a vendor in response to a Request for Proposal (RFP) intended to be used as a basis to negotiate a contract.
- Purchase Order** – A signed written acceptance of an offer from a vendor. A purchase order may serve as the legal and binding contract between parties.
- Request for Information (RFI)** – An information gathering tool used when a purchaser can not clearly identify product requirements/specifications.
- Request for Offer (RFO)** – an informal or formal solicitation method used when making procurements from automated information systems vendors to obtain offers or quotations of prices.
- Request for Proposal (RFP)** – A solicitation requesting submittal of a proposal in response to the required scope of services that usually includes some form of a cost proposal.

- Request for Qualification (RFQ)** – A tool used to determine the most qualified person(s) to perform professional services according to the Professional Services Procurement Act.
- Requisition** – An internal document the end user completes to request goods or services.
- Reverse Auctions** – A real-time bidding procedure that is conducted at a pre-scheduled time and Internet location in which multiple suppliers, anonymous to each other, submit bids for designated goods and services.
- Schedule** – A list of multiple award contracts from which agencies may purchase goods and services.
- Scheduled Purchase** – A purchasing method used for ordering goods in bulk.
- Sealed Bid** – A formal written bid opened in public at a designated time and place.
- Solicitation** – The process of notifying prospective vendors of an opportunity to provide goods or services to the state. Solicitations may be conducted via telephone, fax, mail, e-mail, or in person.
- Specification** – A concise statement of a set of requirements to be satisfied by a product, material, or service, indicating whenever appropriate the procedures to determine whether the requirements are satisfied.
- Statement of Work** – A statement outlining the specific services a contractor is expected to perform, generally indicating the type, level and quality of service, as well as the time schedule required.
- Term Contracts** – Competitively bid contracts for a specific time period and of indefinite quantity.
- Texas Multiple Award Schedule Contracts (TXMAS)** – Contract developed from contracts that have been competitively awarded by the federal government or any other governmental entity of any state. TXMAS contracts offer access to multiple vendors with preferred State of Texas customer pricing.
- TPASS** - Texas Procurement and Support Services, a division of the Texas Comptroller of Public Accounts
- Vendor** – A supplier of goods and/or services to the state.